Geoffrey White, K.C.

604 891 7751
gwhite@cwilson.com

Counsel

Estates & Trusts
Estates & Trusts Opinions and Appeals
Elder Law
International Estates & Trusts
Indigenous Law

Profile

Estate and will planning is intensely personal and meaningful-it culminates into a person's lasting legacy. However, it is often difficult to find the time and resources to make those important decisions. Geoffrey supports our clients with this burden and ensures that their estate goals are implemented in ways that protect wealth and avoid costs and complications.

Work Highlights

Successful BC business family

> Implemented an estate plan that ensures a tax- and cost-efficient transfer of wealth to their next generation. The plan is private, protected, and gives our clients peace of mind for their family's future

Group of trustees

> Successfully managed a large high-conflict estate through complex tax and corporate concerns

Beneficiary who had been disinherited

- Secured a multi-million dollar settlement

Additional work highlights below

Geoffrey's practice of 20+ years has formed his deep knowledge of the rules and laws that apply to wills, estates, trusts and related tax.

Services

- Estate Planning including Trusts, Wills, and Company Reorganizations
- Organizing and governance of societies, charities and tax-effective donations
- Estate and Trust Administration (including Probate and non-Probate solutions)
- Estate & Trust Accountings
- Defending and prosecuting claims against the validity of wills including:

  Interpreting and proving wills
  Undue influence and incapacity claims
  Wills variation claims

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- Lifetime planning for incapacity including:

  Powers of Attorney
  Representation Agreements, and
  Committeeship Applications

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- Representation Agreements, and
- Committeeship Applications

As a sought-after authority in his field, Geoffrey leads industry initiatives. Examples include:

- Implementation of the Wills, Estates and Succession Act (WESA) (2014)
  - On the project committee that made WESA legislative recommendations and on the education team to roll it out.

- BC's Estate Probate Manual
  - Editor of this go-to publication on how to proceed with estate matters

- National Past-Chair of the Elder Law section of the CBA

    > Put together policy positions for Medical Assistance in Dying to make legislative recommendations for the Department of Justice for incorporation into what has now been passed in legislation

These leadership roles position Geoffrey on the frontlines of legislative changes so that he can negate issues before they affect clients.

Geoffrey also has in-depth training to better understand the financial complexities that take place in estate planning. In particular:

> Certified Trust and Estate Practitioner
    > Achieved this certification granted to those who have performed high-level estate work for 10+ years and for more than 50% of their practice

> Canadian Institute of Chartered Accountants In-Depth Tax Course
    > Completed this course to better help clients plan their estates tax efficiently

> Regularly presenting and educating the industry
    > Trains other professionals in the field, including accountants, trust officers, financial planners and insurance advisors

The law is the tool that we can use to ensure that our wishes are respected and objectives are met. Geoffrey finds it humbling to advise our clients through some of their most fundamental decisions, helping to carry out what is important at the end of their lives. He ensures that people can have autonomy while their values and loved ones are protected for the long-term.

Credentials

Awards & Distinctions

> Canadian Legal Lexpert Directory®, Repeatedly Recommended Lawyer, Estate & Personal Tax Planning - Estate & Tax Planning, 2020 - 2023
> Best Lawyers® in Canada, Trusts and Estates, 2019-2025
> Society of Trust and Estate Practitioners (STEP) Private Client Awards finalist for Contentious Trusts and Estates Team of the Year 2021

Industry Involvement

> Canadian Bar Association (Past Chair of the National Elder Law Section, Past Chair of the Okanagan Wills & Trusts Section)
> Society of Estate and Trust Practitioners (Chair of the Okanagan Chapter)
> Canadian Tax Foundation
> Canadian Association of Gift Planners
> STEP
> CBA Wills & Trusts
> CBA Elder
> Kelowna Estate Planning Society

Community Commitments

- Law Foundation of British Columbia (Governor)
- Salvation Army, Community Council, Kelowna
- BC Elder Law Clinic (Past Director)
- People In Motion Society (Past President)
- Central Okanagan Foundation (Past Grants Chair)
- Okanagan Mission Youth Soccer Association (Youth Coach)
- Community Legal Clinic Operating Society of BC, Chair (re LFBC), 2023 - Present
- Central Okanagan Hospice Foundation, President, 2021 - Present

Education & Call to Bar

- In-Depth Tax Course, Canadian Institute of Chartered Accountants, 2004
- Call to Bar: British Columbia, 1994
- Bachelor of Laws, University of Toronto, 1993
- Bachelor of Business Administration, University of Regina, 1990

External Publications & Presentations

- Co-editor
- Chaps 5 & 6
- "Choosing a Professional Executor", Nicola Wealth Management - Jan 30
- "Conflict of Laws" Langdon Hall Conference, Banff - April 8
- "Death Is Not the End - Estate Admin" - CLE BC workshop - April 16-17
- "Estate Planning for Families with a Person with Disabilities" - PLAN, Family Support Institute, Greater Vancouver Family Services, Autism BC, ongoing monthly since 2023
- "Courtroom Brawl: Are You Ready To Be Drawn Into The Battle Of The Lawyers?", Advocis Estate Planning Conference, Advocis, December 2021
- "Lifetime Planning-Not Dead Yet!", Basics of Wills & Estate Planning Conference, Continuing Legal Education Society of BC (CLEBC), November 2021
- British Columbia Probate and Estate Administration Practice Manual, CLE-BC, 2013 to present, Editor
- Physician-Assisted Death and Health Care Decision-Making - The Implications of the Decisions in Carter and Bentley, Canadian Elder Law Conference, CLE-BC, November 2015
- Powers of Attorney and Representation Agreements, Blended Families, CLE-BC, May 22, 2015
- Disability Planning, Estate Planning Update 2014, CLE-BC, October 22, 2014
- Estate Applications Under the New Rules, CLE-BC, February 28, 2014
- How Will Estate Administration Change? Estate Administration: Navigating the New Rules, CLE-BC, February 27, 2014
- Beneficiary Plans, The New Rules: Is Your Estates Practice Ready?, CLE-BC, November 21, 2013
- Decision-making, The Interplay between Aging, Death & Divorce, CLE-BC, June 3, 2013
- Mutual Wills, CBA Wills & Trusts Section Okanagan, March 20, 2013
- Trusts and Disability Assistance, Trusts: the Multi-faceted Estate Planning Tool", CLE-BC, October 19, 2012

- Planning for Incapacity, Estate Planning Update 2011, CLE-BC, November 2, 2011
- Drafting Issues, Powers of Attorney, Pacific Business Law Institute, December 1, 2011
- Powers of Attorney - Big Changes, Society of Notaries Public of BC, September 24, 2011
- Issues for Attorneys, Adult Guardianship Act Amendments, CLE-BC, May 1, 2011
- Developments in Law for Wills & Estates, CBA Wills & Trust Subsection, December 1, 2010
- Beneficiary Plans, Wills Estates and Succession Act Transition Guide, Chapter 7, CLE-BC, 2010
- Planning post - Pecore, Estate Planning and Administration Update 2009, CLE-BC, November 26, 2009
- Health Policy and Law, Elder Law 2009, CLE-BC, May 1, 2009
- Trust Law Update 2008, Making Trusts Work, CLE-BC, November 21, 2008
- Dealing With Probate Disputes, CBA National Webinar, October 23, 2008
- RRSPs and the Estate, RESPs-RDSPs Whose money is it?, Disposition of Remains Out of the Ordinary Problems in Ordinary Estates, CLE-BC, June 27, 2008
- Real Estate Tax Changes and their Impact on Estate and Trust Planning, CBA-BC Wills & Trusts, November 29, 2016
- Estate Litigation: Avoiding It and How to Deal with it if you Can't, Society of Estates and Trusts Practitioners, November 24, 2016.
- Practical Estate Planning for Blended Families, CBA-BC Wills and Trusts, November 16, 2016
- Estate Planning: Case Law Update, CLE-BC, October 6, 2016
- New Law, New Issues: End of Life Planning in a Changing Legal Landscape, CBA-BC, August 30, 2016
- Wills Drafting Workshop, Leader, CLE-BC, June 23, 24, 2016

Additional Work Highlights

Leading provincial society

- Won the right to participate in a Court of Appeal decision that will affect discretionary trusts, and in particular planning for persons with disabilities, across Canada

First Nations Society

- Guided a successful special requisition process to ensure greater accountability to their members